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THE *Livestock and Wool* SITUATION

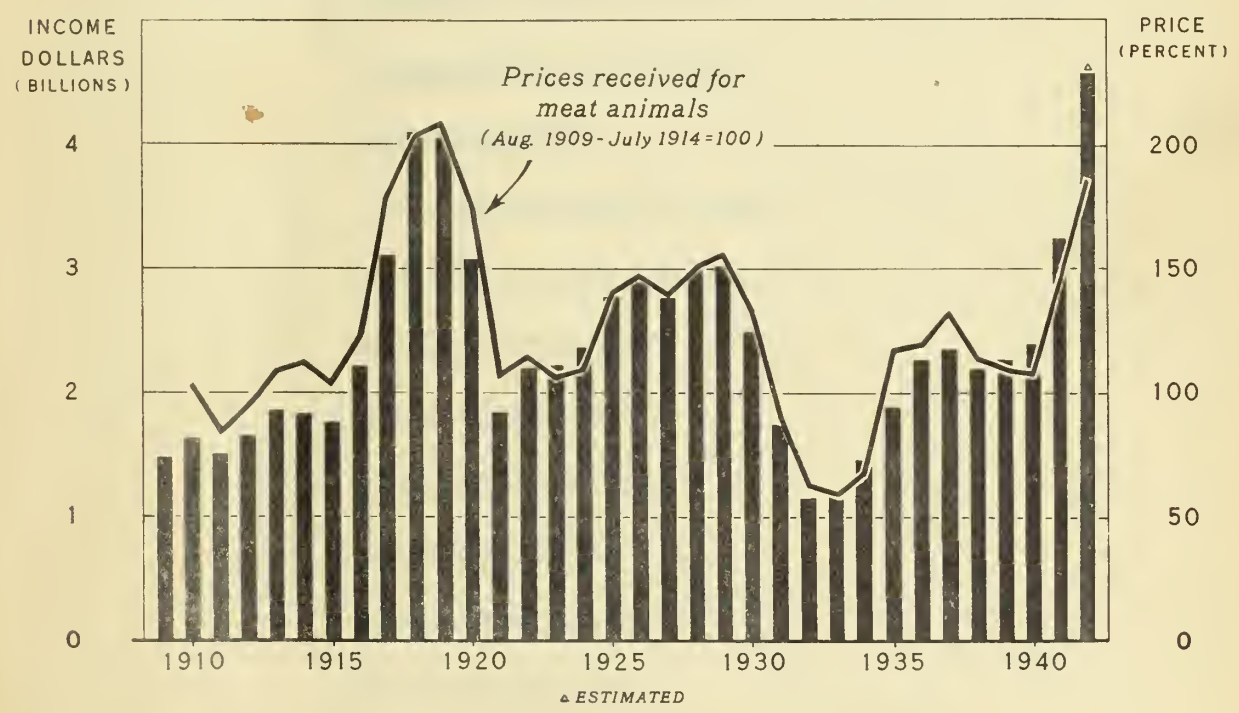
BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

LWS-6



OCTOBER 1942

MEAT ANIMALS: CASH FARM INCOME, AND INDEX NUMBERS OF PRICES RECEIVED BY FARMERS, UNITED STATES, 1909-42

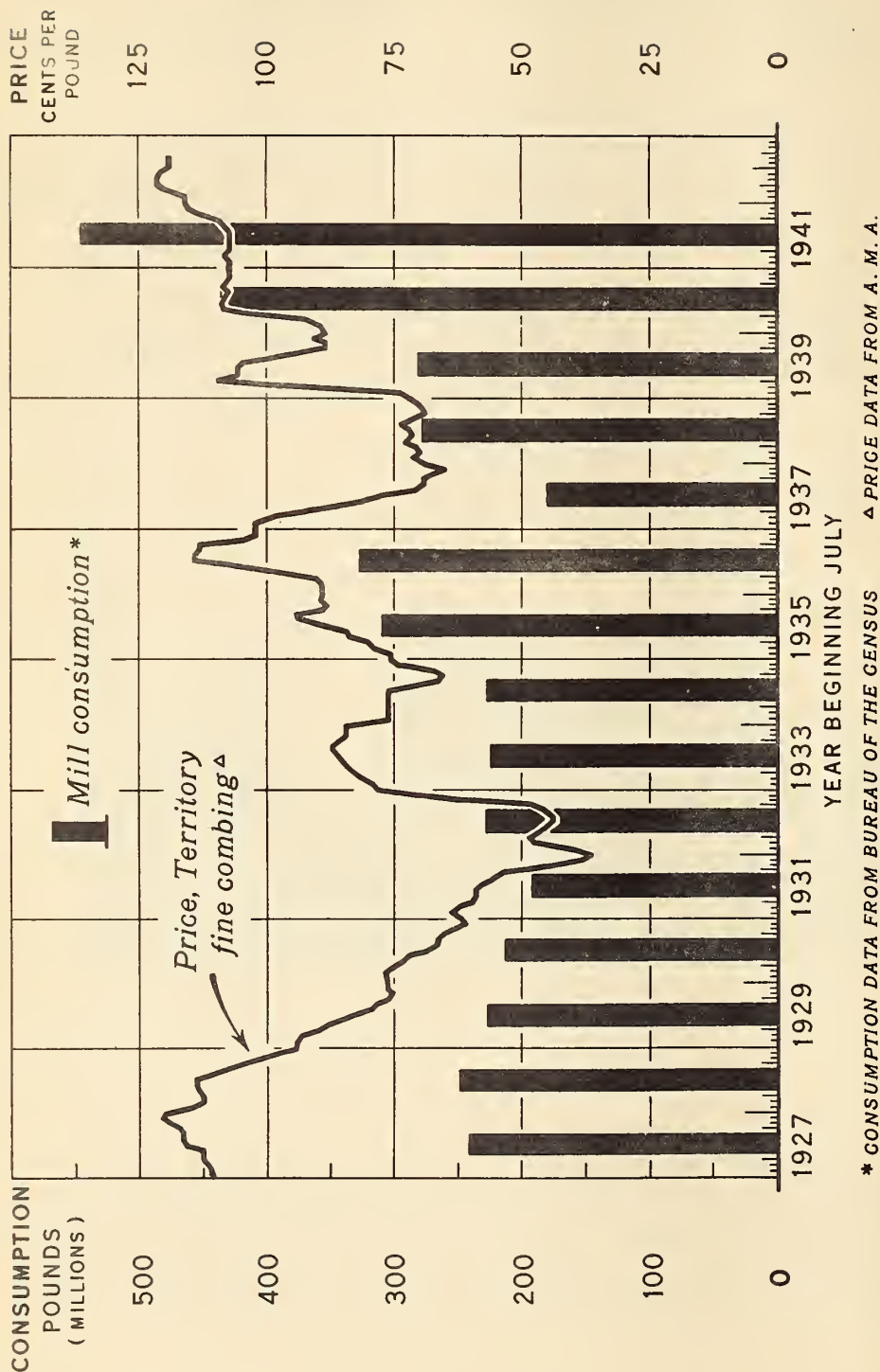


U. S. DEPARTMENT OF AGRICULTURE

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CASH FARM INCOME FROM MEAT ANIMALS IN 1942 IS EXPECTED TO EQUAL OR EXCEED 4.5 BILLION DOLLARS. THIS IS THE LARGEST AMOUNT FARMERS HAVE EVER RECEIVED FROM THE SALE OF LIVESTOCK. THE SHARP INCREASE OVER 1941 REFLECTS A COMBINATION OF THE HIGHER LEVEL OF LIVESTOCK PRICES AND THE LARGEST MARKETINGS OF MEAT ANIMALS ON RECORD. INCOME FROM EACH SPECIES OF MEAT ANIMALS WILL BE AT A RECORD LEVEL, WITH HOGS SHOWING THE LARGEST GAIN.

APPAREL WOOL, SCoured BASIS: MILL CONSUMPTION IN UNITED STATES AND PRICE AT BOSTON, 1927-42



U. S. DEPARTMENT OF AGRICULTURE

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FIGURE 1.- DURING 1941-42 MILL CONSUMPTION OF APPAREL WOOL WAS AT A RECORD HIGH LEVEL BECAUSE OF LARGE MILITARY REQUIREMENTS. THE UPWARD TREND IN WOOL PRICES WAS HALTED IN LATE 1941 BY THE ESTABLISHMENT OF CEILING PRICES FOR WOOL. PROSPECTS FOR 1942-43 ARE FOR A CONTINUED HIGH LEVEL OF WOOL CONSUMPTION, WITH PRICES REMAINING AT OR NEAR CEILING LEVELS.

THE LIVESTOCK AND WOOL SITUATION

Summary

Hog slaughter in the 12 months beginning October 1 is expected to total 94 or 95 million head. The number of hogs slaughtered under Federal inspection may exceed 65 million head, compared with 52.4 million head slaughtered in the 1941-42 marketing year. Despite this sharp increase in marketings, hog prices in 1943 are expected to remain close to recent high levels. Prices may decline seasonally this fall and winter, but the exceptionally strong demand for meats will be a supporting factor throughout 1943.

The outlook for a continued high level of hog production in 1943 is mostly favorable, although the farm labor situation may be a limiting factor. Among the factors favoring large production are abundant feed supplies, the favorable hog-corn price ratio, and the outlook for a continued high level of hog prices.

Despite the large increase in cattle slaughter this year, the number of cattle and calves on farms and ranches at the beginning of 1943 is expected to be substantially larger than a year earlier. Cattle numbers have now reached the point at which slaughter could be increased much further in 1943 without jeopardizing a continued high level of beef production.

Shipments of feeder cattle to the Corn Belt during July-September totaled about 9 percent larger than a year earlier, but were smaller than in those months of the preceding 2 years. Uncertainty regarding the outlook for cattle prices in 1943 appears to be an important factor affecting purchases of feeder cattle this fall. Favorable factors in the cattle feeding outlook include abundant feed supplies, low feed costs in relation to fat cattle

prices, relatively large supplies of feeder cattle, and generally favorable returns from last season's feeding operations.

Heavy marketings of sheep and lambs during the past few months indicate that the upward trend in sheep numbers of the past few years has now been halted. The number of sheep on farms on January 1, 1943 may be slightly smaller than the record large number of a year earlier, and total sheep production during 1943 may be reduced moderately. Indications in early October point to some decrease in the number of lambs fed during the 1942-43 feeding season, compared with the record large number fed in 1941-42. Feeding operations in the Corn Belt may be about as large as a year earlier, but feeding in the Western States may be reduced materially.

Despite the record high level of meat production in 1942 and in prospect for 1943, meat supplies are not large relative to our total wartime requirements. Military and lend-lease needs are absorbing most of the increase in production that has taken place, while civilian demand also has expanded greatly as a result of increased consumer purchasing power. In order to be sure of adequate supplies of meats for military and lend-lease needs during coming months, the Office of Price Administration has restricted distribution of meats to civilian consumers. Consumers are being urged voluntarily to restrict consumption of meats until formal rationing can be instituted in 1943.

Because of the large military requirements, mill consumption of apparel wool in 1943 is expected to continue near the record high annual rate of about 1 billion pounds (grease basis) reached in 1942. This is about 425 million pounds more than the 1935-39 average annual consumption, and is a little over twice as great as total domestic production of wool in 1942. Imports of wool have been large in recent months, and the carry-over of wool into 1943 will

consist largely of foreign wools held in the Government stock pile. Wool prices in 1943 are expected to continue at or near ceiling prices established by the Office of Price Administration. Wool production in 1943 may be slightly smaller than the record large 1942 production of about 460 million pounds (greasy shorn and pulled basis).

— October 24, 1942

REVIEW OF RECENT DEVELOPMENTS

HOGS

Hog Prices Advance to New Peak in October

Hog prices advanced to a new 22-year peak in early October, after having weakened moderately during September. The average price of butcher hogs at Chicago for the week ended October 10 was \$15.45, about \$1.00 higher than in mid-September and over \$4.00 higher than in early October last year. The recent advance in hog prices reflects the temporary reduction in hog marketings during late September and early October. However, the 1942 spring pig crop was 25 percent larger than that of last year, and hog marketings are expected to pick up sharply during the next few weeks.

The spread between prices of butcher hogs and packing sows has narrowed considerably during the past month as marketings of packing sows have decreased seasonally. Highest prices are now being paid for butcher hogs weighing around 300 pounds.

Corn prices have weakened a little since midsummer and, together with the recent advance in hog prices, this has been reflected in some further improvement in the hog-corn price ratio. The ratio, based upon Chicago average prices, was 19.1 for the week ended October 10. This compares with 15.0 in October last year and the long-time average of 11.6. This is the highest the ratio has been since 1926.

Hog Slaughter Increased in September

The number of hogs slaughtered under Federal inspection during September totaled 3,843,000 head, 19 percent more than in August and 32 percent more than in September last year. It was the largest inspected hog slaughter for the month on record. The 1941-42 marketing year (October-September) total was 52.4 million head. This compares with 48.0 million head in 1940-41 and the 1923-24 record slaughter of 53.7 million head. Most of the increase in marketings over a year earlier occurred in the second half of the year, reflecting the 18 percent increase in the 1941 fall pig crop. So far in 1942 the average live weight of hogs slaughtered under Federal inspection has been slightly heavier than in 1941, when it was several pounds heavier than in any other year of record.

Pork and Lard Stocks Reduced Seasonally;
Government Purchases Small

Storage holdings of pork and lard were reduced seasonally during September. Cold storage holdings of pork on October 1 totaled 269 million pounds, roughly 100 million pounds less than a year earlier and 125 million pounds less than the 1931-40 October 1 average. October 1 lard stocks (including rendered pork fat) of 62 million pounds were only 29 percent as large as a year earlier, when stocks were unusually large. They also were only a little over half as large as the 1931-40 October 1 figure.

Purchases of pork and lard for lend-lease and other Government uses were reduced sharply during August and September to help relieve the seasonal shortage of hog products that developed during the past summer. Purchases are expected to be increased greatly during the next few months when hog slaughter will increase. For the entire marketing year (October 1941-September 1942) total pork purchases amounted to about 23 percent of the pork produced under Federal inspection. Because there is some lag in the time from which purchases are reported and deliveries are made, the amount of pork actually withdrawn from supplies available for civilian and other uses may be a little smaller than this percentage indicates. This also may be true for lard, Government purchases of which amounted to about 37 percent of federally inspected output during the 1941-42 marketing year.

Table 1.- Government purchases and federally inspected production of pork and lard, March 1941-September 1942

Month	Pork			Lard ^{1/}		
	Government purchases (actual weight basis)			Federally inspected production (dressed weight basis)		
	Cured and frozen	Canned	Total		Government purchases	Federally inspected production
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1941-						
Mar.-Dec.						
total	243.0	230.0	473.1	5,240.4	326.2	1,269.3
1942-						
Jan.	32.1	75.3	107.4	775.7	67.2	203.3
Feb.	6.2	41.7	47.9	520.2	41.9	128.5
Mar.	30.5	57.5	88.0	544.4	37.3	132.1
Apr.	111.8	108.8	220.6	567.8	106.5	126.9
May	76.7	85.0	161.6	597.1	72.1	135.1
June	91.8	111.1	202.9	654.7	65.8	151.0
July	46.7	132.1	178.9	582.8	80.4	139.0
Aug.	5.7	80.9	86.5	496.4	35.0	106.7
Sept.	7.7	57.2	64.9		13.8	

^{1/} Includes rendered pork fat.

Ceiling Prices for Lard Revised
Upward in Early October

Effective October 13, maximum prices for lard sold by processors were revised upward by the Office of Price Administration, bringing ceiling prices for lard into line with ceiling prices for other shortenings. The new order, Amendment 10 to Revised Price Schedule No. 53, provides for a system of regional differentials based upon shipping costs between specified basing points and points of delivery. The basing-point price for loose lard sold by processors at Chicago is 12.8 cents per pound, compared with the previous ceiling of 11.9 cents. Separate action, effective October 15, also has been taken to establish new retail price ceilings for lard based upon fixed percentage mark-ups over replacement costs.

Cattle Prices Advance Moderately in Early October;
Slaughter Increased

Prices of most grades of slaughter cattle strengthened a little in early October, following the decline of the preceding several weeks. Prices of well-finished slaughter cattle are now about as high as the peak prices reached in mid-August, but prices of the lower grades are about 60 cents lower. The spread between feeder and fat cattle prices also has widened somewhat during the past few weeks. The average price of Good grade beef steers at Chicago for the week ended October 10 was \$14.70, compared with \$14.40 in mid-September and \$11.50 in the corresponding week of 1941.

Cattle slaughter continued near record levels during September and early October as marketings of range cattle increased seasonally. The number of cattle slaughtered under Federal inspection during September totaled 1.2 million head, 5 percent more than in August and 15 percent more than a year earlier. It was the largest commercial slaughter reported for any month since 1918.

Inspected calf slaughter during September totaled 513,000 head, 12 percent greater than in August and 15 percent more than in September last year. So far in 1942 calf slaughter has totaled about 5 percent greater than a year earlier.

Lamb Prices Weaken in Early October;
Slaughter Large

Lamb prices declined in late September and early October, reflecting greatly increased marketings of sheep and lambs. The average price of Good and Choice grade slaughter lambs at Chicago for the week ended October 10 was \$13.90, 40 cents lower than in mid-September but \$2.20 higher than in early October last year. Prices of mature sheep marketed for slaughter in early October were about 80 cents higher than a year earlier.

Continued heavy marketings of ewes and replacement stock, together with the usual seasonal increase in slaughter supplies of lambs, increased total sheep and lamb slaughter during September to 2.2 million head. This was 21 percent greater than in August and 42 percent greater than in September last year. It was the largest commercial slaughter for any month of record.

The proportion of ewe sheep in total slaughter has been unusually large during the past few months. An increase in the number of packing plants operating under Federal inspection also has tended to increase the number of animals reported slaughtered by such plants, but the apparent increase due to this factor is believed not to be large.

Ceiling Prices Established for Mutton;
Temporary Lamb Ceiling Extended

Maximum wholesale and retail prices for mutton were established by the Office of Price Administration in early October at the highest prices prevailing during the week ended October 3. The order, Temporary Maximum Price Regulation No. 22, followed the recent amendment to the Emergency Price Control Act of 1942. Previously, mutton prices were exempt from action by the Office of Price Administration so long as sheep prices were below 110 percent of parity. In mid-September, sheep prices averaged 81 percent of the parity price. The new order also applies to poultry, thus bringing prices of all meat under regulation.

The temporary price ceilings order for lamb, which became effective August 10, now has been extended indefinitely under Maximum Price Regulation No. 239, pending the completion of a price control order in terms of specific dollars and cents prices. Ceiling prices for lamb are thus continued at the highest levels charged by sellers during the period July 27-31, 1942.

OUTLOOK FOR MEATS AND LIVESTOCK IN 1943

MEATS

Livestock production has expanded rapidly in the United States during the past few years. Several all-time high records for the production and marketing of meat animals were established in 1942, and even greater marketings are in prospect for 1943. It is now estimated that the output of beef, veal, pork, lamb, and mutton in 1942 will total approximately 22 billion pounds, and that total meat production in 1943 may exceed 24 billion pounds. These figures compare with a 1935-39 average production of only a little over 16 billion pounds.

Despite this high level of production, total meat supplies are not large relative to our total wartime requirements. Military and lend-lease needs are absorbing most of the increase that has occurred in production during the past 2 or 3 years, while civilian demand for meats also has expanded greatly as a result of increases in employment and wage rates that have taken place. For the coming year increasing military and lend-lease requirements for meats will leave fewer pounds available for civilian consumers on a per capita basis, as well as less than the amount of meat which civilians would like to buy at ceiling prices. This was illustrated by the meat shortages which have developed in several regions during the past few months.

To make certain that sufficient meat will be available for military and lend-lease uses during coming months, the Office of Price Administration

recently has placed restrictions upon the distribution of meats to civilian consumers. For the last 3 months of 1942, commercial meat packers are required to limit deliveries of meats into civilian consumption to the following percentages of such deliveries in the last quarter of 1941: Beef, 80 percent; veal, 100 percent; pork, 75 percent; lamb and mutton, 95 percent. At the same time, consumers are urged to restrict their consumption of meats on a voluntary basis to a weekly average of 2-1/2 pounds (retail weight basis) per adult. This amount of meat, if equitably divided among consumers, is considerably more than the minimum quantity needed to meet satisfactory dietary standards. Formal rationing of meats probably will be instituted by the Office of Price Administration in 1943.

HOGS

1942 Pig Crop Largest on Record

Hog producers this year will raise the largest pig crop on record -- 105.5 million head. This is one third greater than the average pig crop of the 10 years prior to the 1934 drought. The 1942 spring crop of 62 million head is 25 percent greater than that of 1941, and the fall crop, preliminarily estimated at 43.5 million head, is about 22 percent greater than last year's fall crop. Production is up sharply over last year in nearly all States, although the increase in production in the Western Corn Belt since 1936 has lagged behind that in the Eastern Corn Belt and in States outside the North Central area.

Factors accounting for the large increase in hog production during 1942 include: (1) the favorable hog-corn price ratio that has prevailed during the past year and a half; (2) price support announced by the Department of Agriculture through June 1943, which assured farmers of a continued high level of hog prices; (3) abundant supplies of feed grains in the principal hog-producing areas; and (4) generally favorable response by farmers to the wartime need for increased production of agricultural commodities.

Record Large Hog Slaughter Expected

Because of the large increase in the 1942 pig crop, slaughter supplies of hogs in the 1942-43 marketing year (October-September) are certain to set an all-time record. Total hog slaughter in the 12 months allowing for some increase in death losses, may be 94 or 95 million head. The number of hogs slaughtered under Federal inspection probably will total at least 65 million head. This compares with a total federally inspected slaughter in the 1941-42 marketing year of 52.4 million head and the previous record slaughter in federally inspected plants of 53.7 million head in 1923-24.

If the 1943 spring pig crop should again be about 62 million head, hog slaughter in the calendar year 1943 would total about the same as the estimates given above for the 1942-43 marketing year. Any increase that may take place in next year's spring crop would be reflected in a proportional change in hog slaughter during the last quarter of 1943.

Marketing and Processing Facilities
Appear Adequate

With the 1942 spring pig crop up 25 percent over that of last year, the number of hogs marketed during the coming fall and winter season (October-April) may exceed last year by 9 or 10 million head. If marketings follow about the usual seasonal pattern, the number of hogs marketed for slaughter at federally inspected plants during December and January may be as large as 7-1/2 million head in each of these months. The largest number of hogs slaughtered in any one month of record was 6.6 million head in December.

Exact estimates of the peak capacity of marketing and processing facilities are not available but, on the basis of preliminary studies made by the Department of Agriculture, it appears that the heavy run of hogs this winter can be handled without serious difficulty, providing marketings are not concentrated too greatly within the peak marketing period. For the past several months, farmers have been urged to fatten out their early spring pigs as rapidly as possible and to market them as early as they can. Holding late spring pigs beyond the December-January peak marketing period also has been recommended. The Department of Agriculture has been developing marketing plans that can be put into effect should congested marketing conditions develop.

Demand for Hog Products Strong; Hog Prices to
Continue High in 1943

Demand for hog products in 1943 is expected to exceed that of 1942, and it probably will be even stronger than that experienced during World War I. Most of the lend-lease requirements for meat products so far have been for pork and lard. Little beef, veal, lamb, and mutton have been purchased. Meat requirements of the armed forces include somewhat less pork than beef, but the total amount of pork that will be purchased by the Army and Navy also is large. In addition to these needs, consumer purchasing power in 1943 may be close to 50 percent greater than in 1929. Hence, even though slaughter supplies of hogs during the coming year will be much the largest on record, the outlook for hog prices continues favorable. Some decline in prices probably will take place when marketings are seasonally large this fall and winter, but prices during the next 12 months are expected to remain at or near the highest levels permitted by ceilings for pork, lard, and for live hogs. The Office of Price Administration has announced that maximum prices for live hogs will be established in the near future.

1943 Goal for Hog Production Announced by the
Secretary of Agriculture

The 1943 goal for hog production, recently announced by the Secretary of Agriculture, calls for a 10 percent increase in 1943 spring farrowings and a 10 pound increase in the average weight of hogs marketed during next year. Factors favorable to attaining these increases in production include the record large corn crop to be harvested this fall, and the currently very favorable hog-corn price ratio. Growing conditions were unusually good this

season, and the 1942 corn crop is estimated at a little over 3.1 billion bushels, compared with last year's crop of a little less than 2.7 billion bushels. A large proportion of the 1942 corn crop will be used for raising and fattening the 1943 spring pig crop. Even though hog prices may decline seasonally in the next month or so, the large corn supply probably will hold corn prices to about current levels, and the hog-corn price ratio is expected to continue favorable for hog producers.

CATTLE

Cattle Population Expected to Show Further Increase During 1942

Cattle numbers have increased sharply in the United States since 1938, with numbers on January 1, 1942 reaching the record high level of 74.6 million head. Because of this increase, marketings of cattle and calves for slaughter now can be large without cutting into breeding herds. This year inspected cattle slaughter has been running about 15 percent above a year earlier. But despite this large slaughter, cattle numbers may increase 1 million head or more during the year. Weather and feed conditions in the Western Range States have been generally favorable, with the results that death losses have been light and the calf crop has developed favorably.

As shown in the accompanying table, a part of the expected increase in cattle numbers on January 1, 1943 over a year earlier will be in cows kept for milk. Favorable range conditions also may encourage the holding back of breeding stock in the Great Plains area, where numbers are considerably below the pre-drought level. But in the Corn Belt, where cattle numbers are at much the highest level on record and where hog production has been increased sharply, little further increase in cattle numbers is expected.

Table 2.- Cattle on farms January 1, calf crop, imports, slaughter and total disappearance, 1938-43

Item	:	:	:	:	: Preliminary	
					estimates	
		1938	1939	1940	1941	1942 : 1943
		Mil.	Mil.	Mil.	Mil.	Mil.
		head	head	head	head	head
Cattle and calves on farms, January 1 -:	:					
Cows 2 years old and over:	:					
For milk	:	24.5	24.6	24.9	25.5	26.3
For beef	:	10.1	10.0	10.6	11.2	12.0
Total	:	34.6	34.6	35.5	36.7	38.3
Other cattle and calves	:	30.6	31.4	32.7	34.8	36.3
Grand total	:	65.2	66.0	68.2	71.5	74.6
Calf crop	:	27.8	28.8	29.8	31.0	32.0
Imports of cattle and calves	:	.4	.8	.6	.7	.6
Total number	:	93.4	95.6	98.6	103.2	107.2
Slaughter -	:					
Cattle - Federally inspected	:	9.8	9.4	9.8	10.9	12.6
Noninspected	:	5.0	5.2	5.2	5.5	5.7
Total	:	14.8	14.6	15.0	16.4	18.3
Calves - Federally inspected	:	5.5	5.3	5.4	5.5	5.7
Noninspected	:	3.8	3.9	3.7	3.8	3.8
Total	:	9.3	9.2	9.1	9.3	9.5
Total slaughter	:	24.1	23.8	24.1	25.7	27.8
Other disappearance	:	3.3	3.6	3.0	2.9	3.2
Total disappearance	:	27.4	27.4	27.1	28.6	31.0
Number end of year	:	66.0	68.2	71.5	74.6	76.2

Moderate Reduction Likely in Cattle Feeding
During 1942-43

Reports from the principal cattle feeding States in early October indicate considerable uncertainty among cattle feeders regarding the outlook for cattle prices in the 1942-43 feeding season. Other factors which ordinarily influence the number of cattle fed, however, are quite favorable. These include: (1) large supplies of feed grains, hay and roughage, and high-protein concentrates in the Corn Belt and in most of the other important feeding areas; (2) favorable feed costs in relation to fat cattle prices; (3) generally favorable returns from last season's feeding operations; (4) relatively large supplies of feeder cattle. The extent to which these favorable conditions will offset the hesitancy arising from the uncertain price situation is difficult to determine, but it seems probable that the total number of cattle fed in the 1942-43 season will not be reduced greatly from that of a year earlier.

The uncertainty in the cattle feeding outlook this season arises chiefly from the wide fluctuations which have occurred in fat cattle prices since the establishment of ceiling prices for beef in early April. Strong competition from packers for all kinds of cattle suitable for immediate slaughter also has tended to support feeder cattle prices at levels considered to be high relative to fat cattle prices. This has been particularly true for the upper grades of feeder cattle. However, on the basis of average market prices in recent weeks, the spread between feeder and fat cattle prices appears to be at least as favorable for cattle feeding as the average for the past 15 years.

Shipments of feeder cattle to the Corn Belt during the late summer and fall (July-September) have been substantially larger than a year earlier, but smaller than in corresponding months of each of the preceding 2 years. Range conditions were exceptionally favorable in the Western States last year, and the fall movement of cattle was delayed. Although somewhat less favorable than in 1941, range feed conditions have been above average again this year, and it may be that market movement of range cattle this season again will be later than usual.

Shipments of feeder cattle into the Corn Belt during the last half of 1941 were materially smaller than in the same months of the preceding 2 years. But despite the smaller inshipments, the number of cattle reported on feed in the Corn Belt on January 1, 1942 was only 3 percent smaller than a year earlier and among the largest number of cattle on feed on that date for any year. Apparently, at least a part of the decrease in cattle shipments during the fall was offset by the feeding of an increased number of cattle raised in the Corn Belt. Because of the sharp expansion in hog production and the high level of cattle numbers in the North Central States this year, it again appears likely that a larger than usual number of Corn Belt cattle will be fed for market. And if inshipments are about as large as they were in the last half of 1941, the total number of cattle fed in the 1942-43 feeding season will be relatively large.

Reports from the Western States are that cattle feeding operations will be on a smaller scale this year than last in most of these States. In addition to the general uncertainty as to prices, the difficult labor situation also seems to be an important factor with many feeders. Many cattle feeders are putting off the decision as to whether or not to purchase feeder cattle until the sugar beet harvest is completed. Supplies of feed grains and beet byproducts in most of these States are fairly large, but hay supplies are below last year and hay prices are much higher than last year.

In view of the sharp reduction in the number of cattle on feed August 1 this year from a year earlier and the rather heavy marketings of fed cattle in August and September, it seems improbable that there will be as large a carry-over of long-fed cattle into the winter marketing season as occurred last winter.

Cattle Prices Expected to Continue
high during 1943

The outlook for cattle prices in 1943 is favorable. Because of price ceilings on beef, cattle prices generally are not expected to rise much if any

above current levels during 1943. But the prospective demand for meats appears strong enough to absorb almost any supply of cattle that is likely to be marketed next year without a material depressing effect upon cattle prices.

Most of the advance in the general level of cattle prices since early 1941 has been in the lower grades of slaughter cattle. This has been due to several factors, among which have been the strong military demand for beef including canned beef produced chiefly from the lower grades of cattle, and the exceptionally strong civilian demand for all meats. This second factor led to some upgrading of beef on the part of dealers.

The Office of Price Administration recently announced that normal grade differentials for carcass beef prices will be strictly enforced. Because much of the beef from the lower grades of cattle is not sold as carcass beef but is used for canning and sausage production, prices of these grades probably will not be materially reduced by this action. As a result, prices of the lower grades of slaughter steers, cows, and bulls are likely to continue high relative to prices of well-finished cattle in 1943.

SHEEP AND LAMBS

Moderate Reduction in Sheep Numbers Expected During 1942

Sheep numbers have increased steadily in the United States during the past several years, particularly in the Western States and in Texas. Exceptionally heavy marketings of sheep and lambs during the current year indicate that this upward trend has been halted. A moderate reduction in our total sheep population may be under way.

Despite the slightly smaller lamb crop this year than last, marketings of sheep and lambs for slaughter since early May (the beginning of the spring lamb marketing season) have totaled about 15 percent larger than a year earlier. Some of this increase may have resulted from a larger than usual carry-over of yearlings into the 1942-43 marketing season. But with the sharp increase in slaughter during the past 3 months, it appears that a larger than usual proportion of the 1942 lamb crop is being marketed for slaughter and fewer ewe lambs are being held for replacement purposes. The proportion of mature sheep in total slaughter also has been large. These trends indicate that total sheep and lamb slaughter in 1942 may equal or exceed 24 million head.

If death losses during the year are about average, sheep numbers on farms and ranches on January 1, 1943 may be about 500,000 head smaller than the estimated 56.0 million on hand a year earlier.

Table 3.- Sheep numbers on farms January 1, lamb crop, slaughter and total disappearance, 1938-42

Item	1938	1939	1940	1941	1942 ^{1/}
	Million head	Million head	Million head	Million head	Million head
Number on farms January 1 -					
Ewes, 1 year +	34.8	35.0	35.9	36.7	37.3
Other stock sheep and lambs	10.3	10.7	10.7	11.1	11.9
Sheep and lambs on feed	6.1	5.9	5.8	6.5	6.8
Total	51.2	51.6	52.4	54.3	56.0
Lamb crop	30.5	30.1	31.3	32.9	32.3
Total "supply"	81.7	81.7	83.7	87.2	88.3
Federally inspected slaughter	18.1	17.2	17.4	18.1	19.7
Noninspected slaughter	4.4	4.4	4.2	4.2	4.4
Total slaughter	22.5	21.6	21.6	22.3	24.1
Other disappearance	7.6	7.7	7.8	8.9	8.7
Total disappearance	30.1	29.3	29.4	31.2	32.8
Number on farms end of the year ...	51.6	52.4	54.3	56.0	55.5

^{1/} Preliminary estimate.

Sheep and Lamb Production May Be Reduced in 1943

One of the most important factors responsible for the heavy marketings of sheep and lambs during 1942 has been the increasing shortage of skilled labor for handling sheep in the Western States. Rather than run the risk of heavy death losses, many sheepmen are reported to have reduced the size of their herds. It is probable that the labor situation will become even more acute in 1943. With breeding herds reduced moderately by this year's liquidation, the western lamb crop may be reduced somewhat next year, even though weather and feed conditions should be about average.

Sheep production in the Corn Belt and other native States has increased only slightly during the past few years. Because of the sharp increase in hog production that has taken place in many of these States, little or no increase in farm flocks is expected.

Despite the prospective decrease in sheep production during 1943, the over-all reduction in sheep numbers is not expected to be large unless range feed conditions are much less favorable than they have been during the past 2 or 3 years. Because sheep numbers are relatively large, some reduction can take place without jeopardizing a continued high level of sheep production.

Moderate Reduction in Lamb-Feeding Operations Expected

Information available in early October indicates that the number of lambs fed in the 1942-43 feeding season will be a little smaller than the record large number fed a year earlier. Feeding operations in the 11 Corn Belt States may be about the same as last year, but feeding in the Western States may be on a materially reduced scale.

Total shipments of feeder lambs and sheep into the 11 Corn Belt States during July through September of this year did not differ greatly from a year earlier. Feeder shipments inspected at stockyard markets during the 3 months were about 10 percent larger this year than last, in addition to being the largest in 11 years. Records of direct inshipments into seven of these States show a sharp falling off from last year, but this decrease was partly offset by a larger direct movement into Kansas.

Present indications are that the number of lambs fed this year will be smaller than last in Illinois, Michigan, Missouri, South Dakota, and Nebraska; about the same in Ohio, Wisconsin, Minnesota, and Iowa; and larger in Indiana and Kansas. In Nebraska the decrease is expected to be largely in the Scottsbluff area, with some increase probable in the rest of the State. The number of lambs grazed on Kansas wheat pastures this year will probably exceed the record numbers grazed last year. The excellent wheat pastures and bumper grain crops in the Plains section of Texas are expected to increase lamb feeding in that State.

Reports from the Western States based upon indications available around October 1 are that lamb feeding will be on a considerably reduced scale in all of these States with the possible exception of California. The number of lambs under contract to feeders in early October was much below usual. However, in areas where lamb feeding is closely associated with sugar beet production, most feeders are concerned with the problem of getting their beets harvested and are delaying decisions as to feeding operations pending the completion of the harvest. If other conditions are favorable, there may be a good demand for feeder lambs in these areas when beet tops become available later in the year.

The 1942 lamb crop in the Western States was smaller than that of 1941, and the exceptionally heavy slaughter of lambs in August and September indicates that considerably fewer lambs remained in these States early in October this year than a year ago. But because of the general tendency to sell ewe lambs and the restricted demand for such lambs for replacements, it is probable that the number of lambs still available for feeding was about as large on October 1 this year as last.

Outlook for Sheep Prices in 1943

With some further increase in the total demand for meats, sheep and lamb prices probably will continue at or near recent levels in 1943. Total marketings of sheep and lambs for slaughter next year will depend upon the

proportion of the 1942 lamb crop carried over into 1943, the size of the 1943 lamb crop, and the extent to which breeding herds are reduced during 1943. Even though these factors may contribute to heavy marketings next year, slaughter supplies of sheep and lambs in 1943 are not expected to exceed greatly the number slaughtered in 1942.

WOOL

Little Change in Wool Prices Indicated for 1943

During the past few weeks, quoted prices for fine staple combing territory wools at Boston have remained unchanged at \$1.18 to \$1.20 a pound (scoured basis). Quoted prices on 3/8 blood combing fleece wools averaged 53.5 cents a pound (grease basis), a cent a pound above the early spring high for these wools. The average price received by farmers for wool on September 15 was 39.7 cents a pound, compared with 39.4 cents a month earlier. Except for some weakness during the late spring, domestic wool prices have been maintained at ceiling levels during most of 1942.

Prices received by farmers for wool shorn this year are the highest since 1925, and cash farm income from the sale of wool in 1942 probably will exceed 150 million dollars, the largest on record. The high prices received in 1942 have accompanied a strong demand for domestic wool for military purposes. As such demand is expected to continue in 1943, the outlook for domestic wool prices is favorable. But with maximum prices now in effect, and with prices for most wools close to ceiling levels, prices in 1943 are not expected to change greatly.

As large imports will be necessary, domestic wool prices in 1943 will also be influenced by prices of foreign wools. In the spring and summer of 1942, foreign fine wools were available at prices which were lower than prices quoted for comparable domestic wools. Large quantities of wool are now available in the Southern Hemisphere, but the greater part of this wool is owned by the British Wool Control and is sold at fixed prices. Export prices for British Empire wools of the 1942-43 clip are 12 to 14 percent higher than the 1941-42 prices. This increase will bring Boston market prices for Australian fine wools more in line with ceiling prices for domestic wools of similar quality.

Record Mill Consumption Likely to be Maintained

Mill consumption of apparel wool ^{1/} averaged 11.4 million pounds a week (scoured basis) in August, only slightly below the record July rate of 11.5 million pounds. The August rate of consumption was 15 percent higher than in August 1941. About 45 percent of the wool consumed in August was domestic wool, consumption of which has increased steadily in recent months. Mill consumption of apparel wool has been at a record level since 1941. The consistently high rate of consumption this year is a reflection of large military orders. Consumption of apparel wool on a greasy shorn and pulled basis totaled 697 million pounds from January through August, compared with

1/ Domestic wool and all duty paid foreign wool.

about 607 million pounds in the corresponding period last year and a 1935-39 average for those months of about 370 million pounds. About 324 million pounds of domestic wool were used in the first 8 months of 1942.

The increase in consumption of apparel wool so far this year has been offset in part by the decline in consumption of carpet wool ^{1/}, which is not used extensively for military purposes. Consumption of carpet wool in the first 8 months of 1942 was 43 million pounds (greasy shorn and pulled), compared with 129 million pounds in the corresponding period last year and the 1935-39 average for those months of about 90 million pounds. Consumption of carpet wool was at a relatively high level until restrictions were imposed by the War Production Board at the beginning of 1942.

Mill consumption of apparel wool totaled approximately 700 million pounds (greasy shorn and pulled basis) in the first 8 months of 1942. If this rate of consumption is maintained throughout the year, total mill consumption in 1942 will exceed 1 billion pounds, a new record. The 1935-39 average consumption of apparel wool was about 575 million pounds. The large consumption this year is due chiefly to large military orders for wool fabrics. Mill consumption of wool for civilian purposes has been sharply curtailed by the War Production Board. Restrictions on civilian use of wool probably will continue in 1943. Consumption is also likely to be limited by increasing shortages of skilled labor and essential materials, but in view of the large military requirements for wool fabrics and increasing demands for lend-lease materials, little decline is expected in mill consumption in 1943.

Slightly Smaller Production in Prospect;
Large Imports Needed

Wool production in the United States in 1943 may be slightly smaller than the 1942 record production. The large slaughter of sheep and lambs in 1942 may result in a moderate reduction in the number of sheep to be shorn in 1943, while military requirements for shearling pelts may result in reduced production of pulled wool. Production of shorn wool in 1942 is estimated at 392 million pounds compared with 390 million pounds in 1941. Production of pulled wool in 1942 probably will exceed last year's production of 66 million pounds. Domestic growers have been assured an outlet for the unsold portion of the 1942 clip through Army orders for fabrics requiring the use of 100 percent domestic wools.

The carry-over of wool in the United States into 1943 will consist in large part of foreign wools held as a strategic reserve in the Government stock pile. Such wools will not be available for commercial use except in case of emergency. On July 4, dealers and manufacturers had on hand about 600 million pounds of apparel wool (greasy shorn and pulled basis), and some wool was still unsold on farms and ranches. The total stocks on July 4 were about a 7 or 8 months supply at the current rate of consumption. As no further supplies of domestic wool will be available before late spring, additional supplies of foreign wool will be needed if the current high rate of consumption is to be maintained through the first half of 1943. Consumption of apparel wool is now more than twice the domestic production.

1/ Duty free foreign wool used chiefly in floor coverings.

Import Permits Now Required For All Wools

Wools finer than 44s, as well as carpet wools and all other grades, are now subject to the restrictions of General Imports Order M-63, and may not be imported without import permits of the Director General for Operations of the War Production Board. Under Amendment 1 to the imports order, wools finer than 44s were exempt from import restrictions through September 30. The exemption expired October 1 and has not been extended. These wools are used for clothing and other purposes and are the grades required for the production of military fabrics. As wool is a strategic war material and is included on the emergency shipping priorities list which guarantees preference in space on American-bound ships for items considered vital to the Nation's wartime economy, it is likely that permits will be available so far as shipping space is available.

MOHAIR

Because of restrictions on the use of mohair and reduced demand for automobile fabrics, mohair prices so far this year are reported to be below those of 1941 when the average price received by farmers was 57 cents a pound. The outlook for mohair prices in the 1943 season depends to a considerable extent upon how much mohair is used in civilian apparel fabrics.

Demand for mohair in 1942 was sharply curtailed by the conversion of the automobile industry to war purposes. Before the war, 65 percent of the mohair used in this country went into the manufacture of pile fabrics for automobile upholstery. Mohair also is used in men's summer suits, heavy coatings and furniture upholstery fabrics. In view of the restriction on the use of wool, the demand for mohair for such fabrics is expected to increase. Mills recently have announced plans for increased use of mohair in suitings to replace tropical worsteds. Restrictions on the use of mohair under Conservation Order M-73 were removed in August, and mohair now is available for unlimited consumption in civilian goods. Mohair is not used extensively in military fabrics.

Stocks of mohair in August were estimated at 19 million pounds, and a fall clip of about 8 million pounds is now being shorn. A considerable part of the reported stocks were held by country dealers. Total production in 1942 may amount to about 21 million pounds. Demand for the fall clip is likely to be slow until stocks are moved to mills.

Livestock: Marketings and slaughter statistics, by species,
September 1942 with comparisons

Item	Unit	Jan.-Aug.			1941	1942
		1940	1941	1942	Sept.	Aug. : Sept.
<u>Cattle and calves -</u>						
Number slaughtered under						
Federal inspection:						
Steers	Thousand	3,336	3,562	4,252	496	538
Cows and heifers	"	2,635	3,002	3,349	459	526
All cattle	"	6,235	6,878	7,908	1,004	1,103 1,159
Percent cows and heifers						
are of total cattle	Pct.	42.3	43.6	42.3	45.7	47.7
Calves	Thousand	3,541	3,546	3,692	447	460 513
Average live weight:						
Cattle	Lb.	946	960	965	955	937
Calves	"	183	187	195	221	232
Total dressed weight:						
Cattle	Mil. lb.	3,239	3,629	4,186	525	555
Calves	"	363	375	404	56	59
Shipments of feeder cattle and						
calves to seven Corn Belt						
States 1/	Thousand	876	759	778	270	173 294
<u>Hogs -</u>						
Number slaughtered under						
Federal inspection	"	31,264	29,114	34,036	2,920	3,223 3,843
Average live weight	Lb.	236	243	245	245	266
Percent packing sows are of all						
purchases at seven markets ...	Pct.	12	10	12	25	33 28
Total production under						
Federal inspection:						
Pork	Mil. lb.	4,130	3,997	4,739	408	496
Lard 2/	"	1,001	974	1,123	92	107
Average yield per hog:						
Pork	Lb.	132.9	138.6	140.3	140.1	154.5
Lard 2/	"	32.1	33.6	33.1	31.7	33.2
Storage stocks end of month:						
Pork	Mil. lb.	---	---	---	371	337 3/269
Lard 2/	"	---	---	---	218	85 3/ 62
<u>Sheep and lambs -</u>						
Number slaughtered under						
Federal inspection	Thousand	11,266	11,880	12,758	1,567	1,840 2,223
Average live weight	Lb.	86	89	90	85	86
Total dressed weight	Mil. lb.	456	497	532	63	73
Shipments of feeder lambs to						
seven Corn Belt States 1/ ...	Thousand	1,149	1,121	1,203	786	387 720
<u>Total dressed weight of live-</u>						
<u>stock slaughtered under</u>						
<u>Federal inspection</u>	Mil. lb.	9,560	9,831	11,400	1,178	1,329

1/ Total shipments direct and from public stockyards to Ohio, Indiana, Michigan, Wisconsin, Minnesota, Iowa, and Nebraska.

2/ Including rendered pork fat.

Livestock prices per 100 pounds (except where noted) by species,
September 1942, with comparisons

Item	1941 :		Sept.		1942		
	: annual:1924-29:		1940 :		July :	Aug. :	Sept.
	: average:average:		: 1940 :		July :	Aug. :	Sept.
	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.	Dol.
<u>Cattle and calves -</u>							
Beef steers sold out of first							
hands at Chicago:							
Choice and Prime	12.23	14.21	12.53	12.02	14.68	15.77	15.69
Good	11.36	12.59	11.15	11.56	13.75	14.87	14.63
Medium	10.02	10.57	9.08	10.38	12.73	13.38	12.87
Common	8.64	8.42	7.12	8.40	10.78	11.27	10.79
All grades	11.33	12.17	11.50	11.73	13.63	14.87	14.84
Good grade cows at Chicago ...	8.43	8.37	7.33	8.51	10.53	11.29	11.11
Vealers, Good and Choice at							
Chicago	12.17	14.24	11.58	13.65	14.30	14.88	14.99
Stocker and feeder steers at							
Kansas City	9.93	1/ 8.89	8.41	9.98	11.09	12.05	11.64
Average price paid by packers :							
All cattle	9.14	8.42	8.21	9.46	11.30	11.52	2/
Steers	10.67	2/	10.20	11.01	12.59	13.28	2/
Calves	10.12	10.41	8.38	10.63	12.22	12.40	2/
<u>Hogs -</u>							
Average market price at							
Chicago:							
Barrows and gilts	9.47	2/	6.76	11.67	14.55	14.74	14.67
Sows	9.34	2/	5.95	10.16	13.73	13.95	14.18
All purchases	9.45	11.01	6.45	11.04	14.25	14.37	14.45
Average price paid by packers :	9.42	11.21	6.49	11.28	14.12	14.28	2/
Average price No. 3 Yellow							
corn at Chicago 3/	70.4	96.9	64.5	75.1	86.0	84.4	84.1
Hog-corn price ratio at							
Chicago 4/	13.4	11.6	10.0	14.7	16.6	17.0	17.2
<u>Sheep and lambs -</u>							
Spring lambs, Good and Choice :							
grade at Chicago		13.62	9.14	11.93	14.43	14.77	14.20
Feeding lambs, Good and Choice:							
grade at Omaha	10.27	12.92	8.55	11.08	12.52	12.94	12.89
Ewes, Good and Choice grade :							
at Chicago	5.43	5.54	3.53	5.10	5.68	6.01	5.95
Average price paid by packers :							
for sheep and lambs	10.16	12.45	8.30	10.57	12.14	11.87	2/
Index retail meat prices 5/ ..	92.4	102.8	88.0	99.3	109.6	111.4	112.4
Index income of industrial							
workers 6/	127	100	97	138	177	181	2/

1/ 1925-29 average; not available prior to 1925.

2/ Not available.

3/ Cents per bushel.

4/ Number of bushels of corn equivalent in value to 100 pounds of live hogs.

5/ Bureau of Labor Statistics, converted to 1924-29 base.

6/ Bureau of Agricultural Economics, 1924-29 = 100.

Wool: Mill consumption and machine activity, United States,
selected periods, 1940-42

Item	Aggregate				Weekly average		
	1940	1941	Jan.-Aug. 1/		Aug. 1941 2/	July 1942 2/ 3/	Aug. 1942 2/
			1941	1942			
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds	pounds
Mill consumption							
(revised basis) 4/							
Grease basis 5/							
Apparel wool-	639,618	967,685	622,578	697,300	18,735	21,602	21,722
Domestic	486,756	493,934	299,596	323,595	9,578	10,518	11,581
Foreign							
(duty paid)	152,862	473,751	322,982	373,705	9,157	11,084	10,141
Carpet wool-							
Foreign							
(duty free)	138,746	199,453	131,831	42,888	4,064	1,079	674
Scoured basis							
Apparel wool	309,163	509,014	330,925	373,335	9,928	11,474	11,384
Carpet wool	98,708	138,917	91,322	30,622	2,814	809	506
	Weekly average in hours						
Machine activity							
Hours per available							
machine							
Worsted combs	55.1	86.7	84.9	92.2	83.7	94.3	92.0
Bradford	43.5	74.9	72.3	79.2	73.3	82.7	76.6
French	79.4	110.6	110.6	117.0	104.5	116.5	121.2
Worsted spindles ...	37.7	61.0	59.3	58.8	64.5	63.1	62.0
Woolen spindles	43.2	63.8	61.9	74.1	71.0	76.7	74.6
Worsted and							
woolen looms							
Broad	39.0	61.4	59.7	71.2	64.5	74.6	70.4
Narrow	13.6	31.7	29.6	34.6	36.2	31.6	31.6
Carpet and rug							
looms							
Broad	37.9	50.8	50.0	42.6	53.8	37.8	38.6
Narrow	21.9	30.8	31.0	24.2	33.0	24.8	19.1

Compiled from reports of the Bureau of the Census.

1/ The January-August period covers 35 weeks in 1941 and 34 weeks in 1942, hence the totals are not comparable.

2/ 4-week period.

3/ Revised.

4/ New basis adopted by the Bureau of the Census in January 1942. Apparel wool includes all domestic wools and all duty paid foreign wools. Carpet wool includes only foreign wools entered free of duty for the manufacture of floor covering, press cloth, knit or felt boots or lumbermen's socks. In this table data for 1940 and 1941 have been adjusted to the new basis.

5/ Total of shorn and pulled wool. Pulled wool, grease basis, is in condition received from pulleries and is mostly washed.

Prices per pound of wool and other textile raw materials in
the United States, selected periods, 1939-42

Item	Average			1941	1942		
	1939	1940	1941	Sept.	July	Aug.	Sept.
	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Boston market-							
Territory, scoured basis-							
64s, 70s, 80s (fine) staple							
combing	82.7	96.3	108.8	108.1	119.0	119.0	119.0
56s (3/8 blood) combing	69.3	79.7	91.2	92.4	104.5	101.5	103.5
46s (low 1/4 blood)	62.6	76.1	82.3	85.0	91.5	91.5	91.5
Bright fleece, greasy-							
64s, 70s, 80s (fine) delaine ...	32.9	38.0	43.1	42.2	47.0	47.0	47.0
56s (3/8 blood) combing	36.2	41.2	46.8	48.0	49.2	50.0	53.0
46s (low 1/4 blood)	35.5	41.0	46.5	50.0	49.3	49.5	49.5
Foreign wool - in bond							
at Boston 1/							
Sydney - scoured basis							
64s, 70s, good combing	58.6	67.9	72.7	70.5	79.0	79.0	79.0
Cape - scoured basis							
12 months, combing	53.7	62.9	70.9	68.5	76.5	76.5	76.5
Montevideo - grease basis -							
Merinos (60-64s)	26.1	31.2	40.4	41.4	43.0	43.0	43.0
1s (56s)	28.3	32.4	38.6	39.5	42.2	42.2	42.2
Prices received by farmers,							
grease basis, 15th of month ...	22.3	28.3	35.5	36.2	39.2	39.4	39.7
Textile fibers:							
Wool, territory fine staple 2/	82.7	96.3	108.8	108.1	119.0	119.0	119.0
Cotton, 15/16" Middling 3/	9.30	10.17	13.92	17.10	19.42	18.57	18.72
Rayon yarn, 150 denier 4/	51.6	53.0	53.6	54.2	55.0	55.0	55.0
Rayon staple fiber 5/							
Viscose 1-1/2 denier	25.0	25.0	25.0	25.0	25.0	25.0	25.0
Acetate 5 denier	46.0	43.0	43.0	43.0	43.0	43.0	43.0

Compiled from reports of the Agricultural Marketing Administration except as otherwise noted.

1/ Before payment of duty. Compiled from the Boston Commercial Bulletin.

2/ Scoured basis, Boston market.

3/ Average at 10 markets.

4/ Domestic yarn, first quality, Bureau of Labor Statistics.

5/ F.o.b. producing plants, Bureau of Labor Statistics.

1. The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that proper bookkeeping is essential for the success of any business and for the protection of the interests of the owners and investors.

2. The second part of the document describes the various methods used to collect and analyze data. It includes a detailed explanation of the different types of data that can be collected and the various techniques used to analyze this data.

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